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Italian Wine Overview

Report Categories:

Wine

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Report Highlights:

According to the latest data from the Italian Enologists Association (Assoenologi), Italy produced 5.1 billion liters of wine in 2016, 1.5 percent more than the previous campaign and 15 percent above the five-year average, despite challenging weather. Reportedly, quality is excellent. In 2016, Italy's wine exports remained stable at 2 billion liters, valued at \$6.2 billion. The United States (\$1.5 billion), Germany (\$1.1 billion), and the United Kingdom (\$843 million) are key markets.

Italian Wine Overview

Production

According to the latest data from the Italian Enologists Association (Assoenologi), Italy produced 5.1 billion liters of wine in 2016, 1.5 percent more than the previous campaign and 15 percent above the five-year average, despite challenging weather. Wine production decreases in Campania (-20 percent), Lombardia (-15 percent), Sicilia (-7 percent), Toscana (-7 percent), Trentino Alto Adige (-7 percent), Lazio/Umbria (-5 percent), and Friuli Venezia Giulia (-5 percent) were offset by volume increases in Puglia (+12 percent), Abruzzo (+12 percent), Veneto (+7 percent), Emilia Romagna (+3 percent), and Piemonte (+3 percent). Production in Marche and Sardegna remained flat. Reportedly, quality is excellent.

Veneto, Puglia, and Emilia Romagna are the main wine-producing regions, accounting for 52 percent of total production. Approximately one-third of Italy’s wine production is Controlled Appellation (DOC and DOCG). The leading grape varieties for red wine are *Sangiovese*, *Montepulciano*, *Merlot*, *Barbera*, *Negramaro*, *Primitivo*, *Nero d’Avola*, *Cabernet Sauvignon*, *Lambrusco*, and *Aglianico*, while the most popular varieties for white wine are *Trebbiano*, *Catarratto*, *Prosecco*, *Pinot Grigio*, *Chardonnay*, *Moscato*.

Consumption

Wine consumption in Italy has been declining for decades. Causes for the trend include changing lifestyles and tastes, as well as anti-alcohol drinking campaigns. Per capita wine consumption is estimated at less than 36 liters for 2016, considerably lower than 45 liters in 2007 and 110 liters in the 70s. Recent wine consumer surveys show that Italian origin and familiarity with the winery are the main elements in determining consumer choice. Despite economic austerity measures, Italian wine consumers are seeking higher quality wines, but still in the modest price range.

Trade

In 2016, Italy’s wine exports remained stable at 2 billion liters, valued at \$6.2 billion. The United States (\$1.5 billion), Germany (\$1.1 billion), and the United Kingdom (\$843 million) are key markets. The top Italian wines consumed in the United States are Pinot Grigio, Prosecco, Spumante, Moscato, and Lambrusco. Italy’s wine imports reached 166 million liters (valued at \$334 million) in 2016, a 39 percent drop from the previous campaign, mainly due to reduced volumes from Spain (-56 percent) and the United States (-19 percent), the leading suppliers to the Italian market.

Table 1: Italy’s leading wine exports

Year Ending: December

Partner Country	Unit	2014		2015		2016	
		USD	Quantity	USD	Quantity	USD	Quantity
World	L	6,733,547,247	2,021,586,927	5,931,561,381	1,987,647,669	6,174,084,649	2,038,788,954
United States	L	1,473,987,507	292,604,218	1,401,629,989	313,082,369	1,476,625,044	323,372,457
Germany	L	1,290,261,235	587,783,079	1,062,183,413	548,614,334	1,077,789,774	550,213,612
United Kingdom	L	868,388,920	296,183,801	824,512,163	322,273,685	842,974,790	298,150,645
Switzerland	L	420,746,925	70,340,403	357,111,863	68,168,514	373,070,294	71,063,000
Canada	L	365,394,830	68,367,110	332,044,035	69,831,621	338,160,634	72,913,288
France	L	171,845,698	83,864,880	157,070,457	87,428,842	171,239,441	101,005,165
Sweden	L	190,730,516	47,705,243	166,010,146	46,532,588	170,548,920	48,157,335
Japan	L	201,671,924	42,832,173	173,267,801	42,907,650	165,540,341	39,827,946
Denmark	L	186,349,455	41,582,789	160,844,589	40,438,058	162,522,658	39,860,434
Netherlands	L	159,338,217	43,625,575	142,512,750	43,458,169	154,740,438	43,732,172
Belgium	L	133,074,775	29,664,340	118,740,336	30,459,094	123,414,659	31,139,006
Austria	L	129,655,392	50,510,448	100,788,943	45,143,202	110,931,876	50,154,598
China	L	98,538,931	25,212,405	96,105,878	26,239,604	106,734,055	28,989,862
Norway	L	127,187,231	25,737,923	105,096,526	24,393,509	104,076,519	24,067,656

Source: Global Trade Atlas (GTA)

Table 2: Italy's leading wine imports

Year Ending: December							
Partner Country	Unit	2014		2015		2016	
		USD	Quantity	USD	Quantity	USD	Quantity
World	L	381,015,571	254,834,965	351,679,361	271,795,824	334,117,099	166,040,535
France	L	192,064,257	18,794,275	177,548,747	18,125,055	188,799,846	17,072,491
Spain	L	77,795,683	164,314,333	72,858,782	179,450,315	48,525,438	79,530,115
United States	L	59,923,394	47,294,586	45,733,178	41,094,055	42,357,392	33,383,834
Australia	L	12,305,542	9,814,330	17,117,673	16,210,850	12,648,776	12,332,722
Germany	L	13,879,950	5,896,974	14,114,176	7,016,066	10,165,806	3,853,010
Portugal	L	7,965,663	1,828,035	6,362,488	1,653,550	6,811,940	2,251,520
United Kingdom	L	1,134,015	64,971	1,041,839	199,741	3,405,202	4,882,095
Netherlands	L	1,339,458	470,500	1,263,924	112,798	3,019,564	259,693
Chile	L	973,734	315,588	1,121,096	908,150	2,441,832	1,419,983
Austria	L	2,351,396	1,397,042	2,251,080	1,593,205	2,362,260	1,433,507
Slovenia	L	1,076,446	287,572	1,924,871	824,519	2,057,517	810,009
South Africa	L	897,882	753,455	847,265	1,150,365	1,870,688	4,678,601
Hungary	L	1,618,681	1,430,838	1,557,786	1,358,391	1,843,552	1,715,318
Romania	L	1,062,941	487,281	1,104,197	569,293	1,152,170	716,899
Argentina	L	934,044	255,176	799,941	212,171	1,084,019	327,523

Source: GTA

Abbreviations and definitions used in this report:

DOC (Controlled Designation of Origin)

DOCG (Controlled and Guaranteed Designation of Origin)

Harmonized System (HS) Codes:

Grape wine total: 2204

Sparkling wine: 220410

Bottled wine: 220421

Bulk wine: 220429